

SALES & SERVICE ASSOCIATE

Summary

To secure an accounting position with an organization that will utilize my strong educational background and professional experience, while providing stability and opportunity for growth. YDriven and self-motivated Investment Banker with stellar sales ability and remarkable creativity.ears of extensive accounting experience Success in addressing clients' concerns Detail-oriented, efficient and organized with extensive experience in accounting systems Manages accounts payable, accounts receivable and assist in the preparation of financial statements Transactional operations experience, with a strong background in wire transfers and ACH processing Possess strong analytical and problem solving skills, with the ability to make a decision Excellent written and verbal communication skills Trustworthy, discreet and ethical Complete projects on time and able to handle multi-tasking Proficient with Microsoft office package MAS 90, 200 and Peachtree Accounting software, Banking, Finance and Administrative systems Qualified and resourceful financial professional with diverse expertise in private, government and corporate investment.

Highlights

- Advanced accounting background
- Financial forecasting
- Risk management expertise
- Financial analysis

Industrial coverage knowledge

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Application of GAAP regulations

Expert in MS Office Suite

Accomplishments

Exceeded sales objectives in 2014

Achieved top five percentile in monthly sales in December 2014

Received "Employee of the year" Award for asset gathering.

Experience

Sales & Service Associate 10/2012 to Current Company Name City , State

- Perform bank product cross sale which involved; CD, money market, IRA, debit card, new accounts, merchant services, and referring to investment banker for stocks & bonds Perform opening and closing accounts Handle large currency and deal with all clients' inquiries about personal and commercial accounts Responsible for receivable, records, safe box, and distribute cash and cash items such as ATM cards, cashiers' check, money orders, and other negotiable instrument received at the banking center Perform wire transfers, process stop payments, ATM card exceptions Process deposits and loan payments Prepare Federal Reserve invoice for shipments and cash receivables Monitor customer Accounts with the company guide lines Accurate mortgage loan documentation and review of the records Prepared cash settlement daily for the banking center and branch ATM Responsible for investigating bad checks and returned checks Handle customer service inquires via telephone & writing correspondence according to the banks police and procedure.

Delivered informational sales presentations to potential investors to build symbiotic client relationships.

Researched banking guidelines and statutory requirements to stay updated on new laws and applications. Collaborated with legal and accounting counsel to develop marketing strategies for estate and business succession planning insurance.

01/2011 to 02/2012 Company Name City , State

- Collaborated with legal and accounting counsel to develop marketing strategies for estate and business succession planning insurance.

Delivered informational sales presentations to potential investors to build symbiotic client relationships.

MaintainedResearched banking guidelines and statutory requirements to stay updated on new laws and applications. a 80% client retention rate by suggesting strategic investment plans based on fixed income and equity investing report evaluations.

Administrator -AP/AR Specialist 04/2008 to 12/2010 Company Name

- Executed financial due diligence and created a valuation model to establish enterprise value and purchase price. Developed solid estate and tax code knowledge base through continued research and training. Achieved proper compliance and accurate executive level reporting. e companies Performed both Accounts Receivable and Accounts Payable functions Utilized MAS 90, 200, Peachtree accounting, and MS

Office software programs Provide weekly and monthly projections of Accounts Receivable to the accounting manager Performed advertising to promote a business, product, and service Managed the reconciliation of the company POS system and coordinate a daily deposit Performed monthly inventory adjustment report and gross profit report Responsible for Monthly, Quarterly and Yearly tax preparations and filings Extensive verbal & written communication with all the medical agencies including Medicaid & Medicare Functions including composing, signing and releasing routine but somewhat complex correspondence Effectively followed up to resolve problems in timely manner Card Accounting and E-Commerce.

11/2001 to 08/2003 Company Name City , State

- Achieved proper compliance and accurate executive level reporting Created release and project plans and established stakeholder expectations.sion accountants to ensure validity and accuracy of data.
- Prepared Bank reconciliation daily Worked with the internal online cash load which was imported every morning for all Bank of America ATMs in the United States Responsible for remotely located Bank of America ATMs in different parts of U.S.
- for accurate settlement Supervised and audited vendors for the entire cash load that was done by third party security companies Skilled at negotiating and investigating ATM settlement discrepancy Prepared advanced and confidential correspondence Managed online banking functions Maintained existing automated reference files used to process financial data through the accounting system Updated, maintained, and reported Charts of Account and Vendor list.

Education

AAS : Finance May 2001 DeKalb College City , State GPA: Dean's list

Finance Dean's list Coursework in Finance and Business Administration

Computerized Accounting Specialist training

Bachelor of Science : Finance 2016 University of Maryland University College City , State

Mid-Market Investment Banking course

Associate of Applied Science : Finance 2001 Georgia Piedmont Technical College City , State , Dekalb GPA: GPA: 3.8

GPA: 3.8

Skills

Accounting, E-Commerce, financial, financial statements, funds, gross profit, Insurance, inventory, market, MAS 90, Medical Billing, money, MS Office, negotiating, Peachtree accounting, police, POS, Coding, quick, supervisor, tax, telephone, written communication Accounts Payable, Accounts Receivable, advertising, ATM, Bank reconciliation, banking, bonds, CD, Charts, closing, clients, customer service, debit, documentation,